

Job Description

Job Title: Account Representative
Reports To: Manager - Employer Services
Department: Employer Services
Division: Benefits

Pay Range: 4
FLSA Status: Non-Exempt

SUMMARY: This position builds rapport with OPERS employers and resolves employer account issues. This position is also responsible for researching and making recommendations for correcting employer issues including membership, earnable salary, billing discrepancies, delinquencies, and reporting errors.

ESSENTIAL FUNCTIONS:

1. Maintains relationships and favorable contact via telephone, email, and written correspondence with employers in accordance with Ohio Revised Code 145, OPERS Board rules, and administrative policies ensuring accurate, complete, timely, and quality service.
2. Applies billions of dollars in employer payments and credits to reports of retirement contributions, service purchase by payroll deduction reports, employer liabilities, and ERI payments into the ROCKS, TOPS, or accounts receivable systems by executing employer instructions received via a payment remittance advice, through research into an employer's case file, or by determining the best use of funds to minimize employer penalties and interest.
3. Performs research and in-depth analysis of employer financial account activity to include assisting with balancing of subsidiary ledger to the general ledger, delinquency issues and collection of outstanding account balances, certifications, service purchase by payroll deduction, Early Retirement Incentive billings, exception refunds, etc., to ensure accuracy of OPERS Annual Statements, actuary projections, and compliance with GASB 67 and 68.
4. Processes employer reports of retirement contributions, service purchase, non-contributing reports, alternative retirement plan reports and applies accrued interest and payments to employer payment plans. Educates employers on contribution reporting state laws, rules, and system functionality.
5. Responds to escalated calls and GASB questions received from employers.
6. Performs UAT (user acceptance testing) of new and/or updated software/system applications. Provides documentation of testing results for validation.
7. Develops and maintains Employer Outreach documents and procedures on the company intranet (iNET).
8. Provides guidance and mentoring to new peers by conducting mentoring sessions, providing peer-to-peer feedback, cultivating relationships, and motivating new hires during their training period.
9. Identifies needs and trends in employer account groups and recommends potential remedies to the associated compliance team members and management.
10. Markets self-service tools such as ECS reporting and payment and forms submission by initiating contact with employer entities.
11. Performs other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES TO PERFORM ESSENTIAL FUNCTIONS

Education

• High school diploma or GED	• ☒ Required
• Associates Degree in related field	• ☐ Required ☒ Preferred

☐ Direct relevant experience can be substituted for education (if applicable)

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Qualifications

• Aptitude for understanding financial information	• ☒ Required ☐ Preferred
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with advanced skill set for research and analysis	
• Strong customer service skills	• ☒ Required ☐ Preferred
• Strong and concise written and verbal communication skills as well as the ability to actively listening	• ☒ Required ☐ Preferred
• Strong attention to detail and organizational skills	• ☒ Required ☐ Preferred
• Ability to work both independently and in a team environment	• ☒ Required ☐ Preferred
• Ability to multitask and strong time management skills	• ☒ Required ☐ Preferred
• Strong initiative, creative, and ability to think outside the box	• ☒ Required ☐ Preferred

Experience

• 3 years' experience in providing strong customer service to external or internal customers	• ☒ Required ☐ Preferred
• Experience interpreting and delivering complex information in an understandable and compelling manner	• ☒ Required ☐ Preferred
• Experience in a call center environment	• ☐ Required ☒ Preferred

*Physical Requirements** (if applicable)

• Select Physical Requirement
• Other:

***Reasonable accommodations may be made to enable individuals with disability to perform the essential functions. If repetitive physical movement is required to perform the essential functions of the position, please discuss with HR**

DISCLAIMER: The above statements are not intended to be construed as an exhaustive list of all duties, skills and responsibilities required.

OPERS

Ohio Public Employees Retirement System